

**UNITED WAY OF GREATER ROCHESTER
THE COMMUNITY FUND BLUEPRINT FOR CHANGE
2016-2019**

Introduction and Overview

The Blueprint for Change is a planning document that guides the investment of Community Fund dollars, entrusted to United Way by thousands of generous donors in our community. It reflects our goals, strategies and approach to evaluating our work, and establishes how we will measure our success.

We began the Blueprint for Change work in 2008 to revise our investment approach. Faced with declining Community Fund dollars, increasing community need, and rising donor expectations, it was imperative for us to change. At the time we were funding a variety of quality programs, but combatting community challenges, such as poverty and its impact, required that we be more focused and strategic. Equally important, we wanted a prospective plan that provided a transparent way for us to demonstrate how Community Fund dollars will be invested.

To make this critical change we adopted a Theory of Change discipline. Using this discipline we spoke directly with community members to get community-defined critical needs for our United Way to address. We continued to engage the community, including people impacted by poverty and those needing services, as we reviewed research, commissioned experts to identify promising solutions, and crafted strategies. The result was the strategic plan for community investment; our Blueprint for Change 2010-2013. Implementation followed, starting with open and competitive grant processes to select partners and the launch of strategy evaluations to measure our success.

The second generation plan, the Blueprint for Change 2013-2019, lengthened our strategic plan from a three-year to a six-year timeframe. With this change we committed to taking a mid-point pause to “refresh” the plan. The Community Fund Blueprint for Change 2016-2019 is the result. It is an evolution of the Blueprint, both refining our investment focus and raising the bar on expectations of funded partners. It is timed to inform investment decisions for the investment period beginning August 1, 2016.

The Blueprint Refresh incorporates the main themes heard from the hundreds of individuals involved in the work:

- strong endorsement for the Blueprint strategies and process
- strong support for strategy evaluation and the positive results being achieved
- the need to more narrowly focus investment of declining resources.

Our stakeholders told us their preference, almost 2:1, for investing in a narrower range of prioritized programs at higher funding levels than a wider range of programs at lower levels. In short, do fewer things exceptionally well. As a result, we reviewed the Blueprint with an eye toward investing in fewer strategies in our four areas of funding. While the refresh does not call for a dramatic shift from our original plan, we are refining the plan to more strategically focus resources in cohesive, preventive strategies that offer the best opportunity to make a measurable improvement across our four focus areas.

As we implement the Blueprint we will be intentional about connecting the investment strategies with the newly launched Rochester Monroe Anti-Poverty Initiative (RMAPI). Preventing and mitigating the effects of poverty has been core to the Blueprints. Aligning with RMAPI amplifies the potential of this unprecedented opportunity to make the type of marked and lasting change needed to provide a better life for thousands of our children and families.

Mission and Guiding Principles

United Way's mission is to magnify and focus the power of community resources to prevent and address our most pressing social needs. The primary strategy to accomplish this mission is to make a measurable difference in our community. We do this by investing dollars donated to the Community Fund, the single largest and most integrated community-based resource to address our most daunting human service challenges, in proven, preventive programs. The Community Fund Blueprint for Change guides the investment of Community Fund dollars entrusted to us by thousands of generous people in our community.

Our Blueprint for Change, and the investments that follow from it, are guided by the following principles:

- Our first responsibility is to serve our community.
- Our focus is to identify priorities and implement effective and efficient strategies to achieve measurable results in areas where we can make the most significant impact.
- We work for long-term success and seek to address the root causes of social problems.
- We proactively identify the most advanced approaches to community problem-solving so that our limited resources are invested in strategies that best address our community's challenges.
- We believe that focusing on prevention and evidence-based and promising practices with demonstrated effectiveness are the best investments.
- We hold ourselves accountable for the prudent investment of community resources.
- We seek out a broad range of opportunities to create innovative and effective partnerships to address our community's most critical challenges.
- We partner with others that share our passion and commitment.
- We build constructive relationships based on mutual respect, candor and understanding.
- We are willing to take smart risks and move with urgency to address our community's most pressing needs.
- We value transparency and accessibility through honest and full disclosure to donors, agencies and the general community.
- We value inclusiveness and the perspectives, opinions and experiences of the broadest-possible cross section of people—donors, partners and people served—to inform our decisions.
- We set high standards for all we do and assess our performance.
- We learn from our mistakes and act nimbly on what we learn.

Wicked Problems

The community challenges have not lessened since the Blueprint was first published. We continue to live in an unprecedented time of great change and challenge. The problems that our community faces are increasingly complex and interrelated; challenges like poverty, education and the largest generation of our time entering retirement.

These complex issues have become known as "wicked problems." Jon Kolko describes these as "continuously shifting issues where neither the problem nor the solution is clear or stable." Every wicked problem is unique and there are no common solutions or even a guide for how to tackle them. And, these problems are interconnected. In short, there are no single problems any more than there are single solutions. While on paper our focus areas and strategies seem separate, we appreciate how interconnected they are. As our approach evolves and we continue refreshing our Blueprint to reflect our community's needs and challenges, we will be better able to express the inter-relatedness.

Inclusion

Inclusion and the deliberate transition from separate strategies for people with disabilities to including diverse populations within each of our strategies has been a significant part of our journey over the past

five years. United Way celebrates diversity in all of its forms, including but not limited to: age, ability, ethnicity, gender, race, religion, sexual identity and economic circumstance. We believe that our mission is best fulfilled when we embrace diversity and inclusion as a value and a practice.

We developed the Community Fund Blueprint for Change to be inclusive in the broadest sense of the word. This principle has specific impact on the way we approach disability services. Rather than having a separate focus area or strategy for disabilities services we have integrated the needs of people with disabilities into the strategies for babies, youth, families and older adults. The positive community response to this approach over the past few years has reinforced that we are on the right path and we will continue to move toward true and full inclusion.

Ensuring We're Making a Difference

Knowing that our work is making a difference and that we are using Community Fund dollars in the most effective way to achieve measurable results is critical. We have a dual approach to doing this. We monitor program investments to ensure individual programs are getting the intended results. We also evaluate our funding strategies to ensure that we are making progress holistically.

Our partners are engaged in strategy evaluations by helping identify the questions that our evaluations seek to answer and participating in the selection of common data collection tools. They also contribute data needed for the evaluations, most often through COMET, a web-based data collection and analysis tool provided to our partners and used by United Way staff to monitor program performance. We engage outside experts as needed. The Children's Institute has been a critical evaluation partner for youth programs and we expect to build from and expand our work with them as our evaluation partner. Finally, we will review findings of data analysis intended to inform continuous improvement and share results widely to advance our work in the community.

We will continue to use learning circles to advance our work by supporting our funding partners and as a platform for determining how to implement the results of our evaluation. By definition, learning circles are groups of individuals with a common interest who meet regularly to lead action and change. Our learning circles have proven successful in increasing coordination among agencies, improving information sharing, creating better understanding of our evaluation results and putting that understanding to work to improve programs. Moving forward we will expand our learning circles, intentionally adding agencies doing work aligned with our strategies, but not funded by United Way and other key stakeholders who will contribute to discussions that lead to better practices, better coordination, better informed practitioners and ultimately better results for the community we serve.

Community Fund Investment Focus

We will continue to focus Community Fund dollars in four major areas:

- 1) **Meeting Basic Needs**
- 2) **Giving Babies the Best Start**
- 3) **Preparing Kids for Success**
- 4) **Supporting Seniors and Caregivers**

More information about each focus area and the strategies we plan to fund and evaluate follows. Related information is posted on our website, www.uwrochester.org, along with information on how to apply for Community Fund investments to implement programs aligned with our strategies, a list of current investments, and highlights of the results we've achieved.

As we declare our investment strategies, it is important to also state that we realize that no single funder has the resources to tackle these issues alone. We will enlist others to work with us and join community efforts to help ensure we accomplish as much as possible in these four areas. We will also work to advocate for change and mobilize volunteer resources where appropriate to support this work.

Meeting Basic Needs

Helping people meet their most basic needs is the crucial first step to successfully help them tackle other life challenges, move from crisis situations to foundational stability and get on a path out of poverty. As recent headlines have demonstrated, the rate of poverty in Rochester is alarming:

- The City of Rochester's poverty rate continues to rise with 1 in 3 city residents living in poverty.
- Childhood poverty has increased and now half of our city children live in poverty.
- Rochester has the highest rate of extreme poverty (defined as people living below 50% of the poverty level) among comparable cities at 16.2%.

The statistics for especially vulnerable people are especially alarming, including more than 500 homeless and runaway youth, victims of the more than 5,900 domestic violence incidents reported each year, and people with disabilities who often require specialized services.

These statistics represent a challenging life for tens of thousands of our neighbors, like the 46,000 people helped by basic needs programs last year, the vast majority of whom had incomes of less than \$15,000. This year, during the first six months of a strategy evaluation pilot with seven programs, 13,000 people received help. As a result of this pilot we learned that over half the people seeking assistance (56%) were from households without children. Most (61%) made only one visit to one program site, which was counter to the multiple visits we expected to see. The primary reasons people sought assistance were for food (61%), clothing (15%) and personal hygiene items (14%) that can't be purchased with SNAP (Supplemental Nutrition Assistance Program) benefits.

Recognizing the extreme poverty in our community, we must continue making the best investments possible to help families and individuals meet their basic needs. We will partner with agencies that work to mitigate poverty and create a safety net that catches people in times of crisis, helps stabilize them by addressing their basic needs and connects them to community resources that will support them on a path toward greater self-sufficiency.

Goal. The Meeting Basic Needs focus seeks to ensure that all individuals and families in our community have their basic needs met. This means they must have food, clothing and housing; that they can access government benefits, including healthcare; and that they are linked to services that put them on the path to greater self-sufficiency.

Progress toward this goal will be measured by tracking data contributing to the ability to **Meet Basic Needs** as measured by these indicators:

1. Immediate basic needs are met
2. Screening for, and linkages to, financial resources and public benefits
3. Linkages to additional community resources

Investment Strategy: Basic Need Services

We will continue to invest in services that help individuals and families meet their basic needs and establish a foundation upon which they can begin to address the other challenges they face. We will do this by integrating the Basic Needs and Disability Resource Connections strategies into one comprehensive, inclusive strategy. As mentioned above, this integration represents an intentional step in our commitment to inclusive programming across our focus areas, a recognition that the services provided through the two previous strategies are more similar than different and a belief that unifying the strategies will bring together providers in ways that will improve services for all.

The challenges associated with poverty are multifaceted and interconnected. A person seeking assistance to feed his or her family may also need a living wage job, help with transportation, childcare assistance, safe housing and credit repair services. Meeting basic needs is a necessary first step in addressing other related issues. Therefore, we will invest in several approaches to meeting basic needs, including: (1) programs that directly provide people with food, clothing and housing assistance, (2) programs that eliminate barriers to securing basic needs, and (3) emergency housing for homeless youth and victims of domestic violence.

Programs directly provide food, clothing, and housing assistance must exhibit quality practices and elements including:

- Reaching a broad and diverse population of individuals and families
- Providing a continuum of comprehensive services
- Having experienced staff who are:
 - culturally competent and able to work effectively with diverse people, including people with disabilities
 - both knowledgeable of community services and government benefits and experienced in effectively accessing these resources
 - practicing person-centered planning and able to balance what is *important to* and what is *important for* people to achieve their self-sufficiency goals

These programs will serve those seeking assistance by:

- Conducting a needs assessment to document the presenting need and related concerns
- Providing direct assistance to resolve the presenting food, clothing and/or housing need
- Identifying, screening for eligibility and connecting people to public assistance supports including Social Security, Medicaid, Medicare, pharmaceutical programs and waiver programs
- Making connections to other services (i.e., mental health, substance abuse treatment, job placement) as needed
- Delivering intensive, short-term (up to six months) services that help people gain information, skills and personal support networks to support the long-term journey toward self-sufficiency
- Providing appropriate service delivery approaches, including use of adaptive technologies and delivering services in a variety of locations, including individual's homes, as appropriate, to ensure full access of services for people with disabilities

Programs that eliminate barriers to securing basic needs, are those that:

- Connect people with appropriate basic needs services
- Provide assistance in obtaining public and private benefits including: tax credits, child support, Supplemental National Assistance Program, health insurance, and government assistance
- Provide assistance working with landlords and lenders to ensure housing stability

Programs that provide emergency shelter for homeless youth and victims of domestic violence will:

- Provide emergency shelter in accordance with all applicable regulations
- Maintain 24-hour on-site staff support
- Ensure people have their basic needs met while in residence and transition them to situations where those needs continue to be met
- Deliver a continuum of services including outreach, support services, and connections to safe, affordable, permanent shelter at program exit
- Make linkages to critical services to support transition to greater self-sufficiency as needed
- Incorporate best practices such as motivational interviewing and trauma-informed care

Giving Babies the Best Start

The sooner we can improve the lives of children, the higher our chances to make long-term impact. Even the best prepared parents find challenges with the increasing demand of raising children. Parents living in poverty, teenage parents who have not completed high school and those with unaddressed issues of trauma and toxic stress face extra challenges that can impact their ability to appropriately respond to their children's needs. Young children living in poverty—half of all City of Rochester children—are especially vulnerable. Research shows that children living in poverty suffer from poor diet, lack of mental stimulation, depressed mothers and exposure to violence, which contributes to higher rates of academic failure, grade retention, school drop-out, teen parenthood, smoking and illegal drug use. Additionally, these children are likely to experience childhood trauma or maltreatment. The personal and societal costs of this are staggering—an estimated \$210,000 in lifetime costs for every maltreated child. And, research suggests that trauma is the underlying cause of many of our biggest public health problems. We will prevent these negative effects and improve outcomes for our children by partnering with agencies delivering evidence-based home visitation.

Goal. The Giving Babies the Best Start focus seeks to ensure just that, that all babies are given the best possible start in life. This means that they have their basic needs met and are healthy, living in strong, nurturing families, free from abuse and neglect and meeting developmental milestones.

Progress toward this goal will be measured by tracking data contributing to **Improved Child and Parental Well-being** as measured by these indicators:

1. Increased parenting competence and confidence
2. Improved parenting skills and practices
3. Improved maternal mental health (decreased depression)
4. Maintained or improved child health (healthy birth, well-baby visits, immunizations)
5. On target developmental milestones, including social-emotional development
6. Reduced child maltreatment risk factors (lack of empathy, role reversal, corporal punishment)
7. Early detection and treatment of trauma
8. Reduced child abuse and neglect

Investment Strategy: In-home Parent Education and Support

We will narrow our focus to one strategy, evidence-based in-home parent education and support. We will continue to invest in a trilogy of evidence-based home visitation models we feel best align with our goal and outcomes and which have demonstrated success both nationally and locally: Parents as Teachers, Nurse Family Partnership and Building Healthy Children. Through these programs we serve babies and mothers prenatally to age five, with a concentration on the prenatal to three age-range. These models recognize that, for this age range in particular, the health and well-being of the child and parent are

interdependent. As such, a dual-generational approach addressing the needs of the parent-child dyad is used and both the needs of the parent and the child are met.

We are making progress with this approach. Our partners serve close to 1,000 families annually, about half of what we believe we could serve given adequate resources. Our families are up to three times more likely to be at high-risk for child maltreatment than parents in general; 75% are single parents, 72% have incomes under \$15,000 and 31% were maltreated as children. Despite these challenges, our programs are helping families achieve positive results. For example, in one program babies are current with their well-baby visits (98% compared to 90% in the general population), up to date on immunizations (93% compared to 86%), free from maltreatment (98% compared to 95%) and less likely to make an emergency room visit. At program graduation our children tend to be on track in reaching developmental milestones and in families with supported, confident parents who are employed, achieving their educational goals (e.g. high school diploma and/or attending college) and on the track to greater self-sufficiency. The parent-child relationship is also enhanced as our mothers experience less stress around parenting and are more in-tune with their child's needs.

Each program individually has similar results and each, standing alone, has merit. However, the partners agree that the true potential for maximizing outcomes lies in re-designing our community's approach to home visitation, sharing the strengths of each program across the network and together building stronger alignment with key partners to better meet the complex needs of our at-risk families. This work is underway and will continue as the critical work of Giving Babies the Best Start.

It is our goal to double the number of at-risk families receiving these services. We expect that some of this expansion will be realized through the NYS Delivery System Reform Incentive Payment Program (DSRIPP), which is transforming Medicaid services. In addition, for every \$250,000 additional dollars raised for Giving Babies the Best Start, we will increase the number of professional home visitors in our community and expand services to an additional 100 at-risk families. All parents need support raising children, but the additional stressors of being single, living in or near poverty, and having few or no support systems means additional assistance is critical to ensuring that children and their families have a great start in life and continue to grow and thrive.

Preparing Kids for Success

Our youth face daunting challenges—poverty being the leading concern—as poorer kids are at greater risk for poor academic achievement, school dropout, abuse and neglect, behavioral problems, physical health problems and developmental delays. To prevent our at-risk kids from these kinds of negative outcomes, we must invest in strategies that support their positive development into adulthood, with a particular focus on supporting their success in school. The situation is challenging:

- More than 50% of school-aged city youth live in poverty
- 85% of RCSD children are eligible for free or reduced-price school lunches
- Just over half of RCSD students graduate from high school in four years

Education has been and continues to be a pathway out of poverty. Without a high school education, the likelihood of our youth working their way out of poverty is extremely low. We will support youth education by partnering with agencies that provide mentoring and out-of-school learning and enrichment opportunities that help keep kids excited about learning, attending school regularly and achieving academically, as well as providing them opportunities to grow interpersonal skills and self-confidence that help them make sound decisions for their futures.

Young people told us that they want the same things we hope to provide them: safe places to live, learn and play along with caring adults—parents, teachers, youth workers and community members—to guide them. We need to ensure that youth have these supports to help them develop a positive sense of self and make the meaningful connections to family, school and community that lead to high school graduation, post-secondary training, career attainment and life success.

Goal. The Preparing Kids for Success focus aspires to ensure that every young person in our community is ready by 21 for college, work and life.

Progress toward this goal will be measured by tracking data contributing to getting youth **Prepared for a Successful Future** as measured by these indicators:

1. Regular attendance in out-of-school-time programs
2. Increased school attendance
3. Improved academic performance
4. Increased high school graduation
5. Increased social-emotional and physical wellness

Investment Strategies. We will continue to invest in high-quality, structured and inclusive After-School and Summer Learning and Enrichment programs for youth academically or developmentally in kindergarten through 8th grade and in evidence-based and research-informed Mentoring for youth through high school graduation.

Investment Strategy: After-School Learning and Enrichment

Our youth spend the majority of their waking hours out of school. Providing high quality, positive, engaging programming to fill this time can make the world of difference in their behavior and school work. Youth who participate in out-of-school time programming are more likely to do well in school, get sufficient physical exercise and avoid involvement in risky behaviors. Our strategy evaluation shows this to be true for our programs where we've seen participating youth attending school more regularly (an average of 4 more days each year) and earning higher GPAs than their non-participating peers. We also learned that greater program attendance is linked to stronger outcomes, with students attending programming more hours having better school attendance and GPAs on average. This reinforces our commitment to ensuring consistent participation.

More than a decade of research and program evaluations have identified key elements of quality after-school programs that contribute to academic and social results for participants that last into adulthood. We incorporated these elements into the minimum standards of quality required of our funded programs including:

- Being registered as a School Age Child Care with the Office of Children and Family Services
- Operating during the months of the school year
- Delivering at least 3 hours of programming daily, immediately following the end of the school day
- Providing welcoming and inclusive environments for diverse youth
- Providing appropriate healthy snacks/meals per Child and Adult Care Food Program guidelines
- Providing 30 minutes of moderate to vigorous physical activity daily
- Incorporating daily literacy activities and offering homework help at least an hour daily
- Intentionally offering interdisciplinary experiential activities in the areas of arts & culture; physical and emotional health and wellness; leadership and service learning; and STEM
- Ensuring youth voice and choice by engaging youth in program development, activity choices and soliciting feedback on an annual written youth survey

- Providing monthly parent and family-focused activities
- Maintaining high average daily attendance and youth participating at least 9 hours weekly
- Maintaining an optimal 1:10 staff to youth ratio
- Having a program coordinator responsible for written lesson plans and staff leadership
- Having trained staff, demonstrating ability to engage youth and lead purposeful activities
- Having planning, training and supervision time built into the schedule for all staff

A few refinements in our approach to after-school programming are needed to best focus and invest resources. This past year we initiated a change in our funding approach away from paying for a projected maximum number of available program seats to paying for seats actually filled. We will build on this work and, in partnership with providers, define a true pay for participation approach which factors in daily attendance and youth meeting or exceeding the nine hour per week minimum attendance standard. This new approach will be completed by year-end 2015 and implemented in August 2016.

During the past two years, with the introduction of longer school days within a growing number of Rochester City School District schools, we've seen a decrease in after-school program participation. In many cases the school day now goes until 5:00 p.m. which decreases the need for traditional after-school programs. As the number of extended day schools increases, so will the number of students staying in school during what used to be the after-school hours. This will further reduce demand for after-school programs. While after-school demand has decreased and will likely continue to do so, the demand for summer programs has increased. Therefore, while we will continue to invest in after-school to ensure a full complement of out-of-school time programming, we expect to change the balance of our investments to direct more resources to the summer strategy. The distribution between the strategies will not be determined until year-end. We are continuing to conduct research, in partnership with our program partners and with the Rochester City School District, to better understand after-school needs from parents' perspectives. The results of this research, together with a review of letters of intent, will be incorporated into program portfolio recommendations crafted for volunteer review.

Investment Strategy: Summer Learning and Enrichment

All young people experience learning losses when they do not engage in educational activities during the summer. For youth impacted by poverty and lacking resources to participate in these activities, the summer loss is significant. These losses are contributing factors to the achievement gap between lower- and higher-income youth. Johns Hopkins University research shows that "more than half of this achievement gap can be explained by unequal access to summer learning opportunities. As a result, low-income youth are less likely to graduate from high school or enter college."

Our continued investment in Summer Learning and Enrichment will help level the playing field by ensuring that at-risk youth have high quality summer experiences that will help reduce summer learning loss and help them succeed. As with after-school programs, quality matters in summer programming and we incorporated recognized quality standards into the following minimum requirements of quality practice and program structural elements for funded programs:

- Meet Office of Children and Family Services registration requirements
- Offer programming a minimum of 150 hours over the course of the summer
- Provide welcoming and inclusive environments for diverse youth
- Provide appropriate healthy snacks/meals per Child and Adult Care Food Program guidelines
- Provide 30 minutes of moderate to vigorous physical activity daily for every 3 hours of programming
- Provide daily reading and literacy activities using best practices to support young readers

- Offer interdisciplinary experiential activities in the areas of arts & culture; physical and emotional health and wellness; leadership and service learning; and STEM
- Offer a variety of youth-influenced, age-appropriate experiential learning activities using the out-of-doors, physical activity, and integrating language arts
- Offer field trips
- Maintain consistent youth participation, defined as youth participating a minimum of 100 hours
- Maintain an optimal 1:10 staff to youth ratio
- Have a program coordinator responsible for written lesson plans and staff leadership
- Have trained staff, demonstrating ability to engage youth and lead purposeful activities
- Have planning, training and supervision time built into the schedule for all staff

We continue to raise quality standards for our programs in an effort to deliver the best possible programming for our youth. For 2016-2019 this includes an increase in the minimum hours of program operation expected of funded programs from 120 to 150 hours. This new, higher standard aligns our standards with those of the National Summer Learning Association and is consistent with program hours offered by most of our program partners. As with our after-school programs, we will be working with summer partners to standardize our approach to investing in summer program seats and factoring attendance by youth meeting the program attendance standard into future investment calculations.

Additionally, we expect to make a higher investment in summer programming to help reduce summer learning loss and help at-risk youth succeed. Our ability to increase investments is affected by Community Fund resources available for investment. For every \$250,000 in increased funding to Preparing Kids for Success we could engage an additional 200 youth in Summer Learning and Enrichment programs.

Investment Strategy: Mentoring

Ask our community’s young people what they need to be successful and they will tell you that it’s critical they have caring adults in their lives. Equally important, countless studies tell us that kids with a caring adult in their lives are more successful in school and life. Youth mentoring programs connect youth to committed, caring adults in order to build attitudes and skills which will help them be successful students and citizens. For at-risk youth, having a mentor reduces the incidence of delinquency, substance use, and academic failure while improving self-esteem, social skills, and relationships with parents and peers.

We will continue to invest in evidence-based and research-informed mentoring programs for at-risk youth from kindergarten through twelfth grade. Mentoring programs must:

- follow an evidence-based or research-informed model with fidelity
- have a high degree of evidence of strong positive social and academic results
- provide an adult mentor assigned to each participating youth
- be highly structured with clear, written protocols for mentors and expectations for youth
- ensure mentors are trained, supervised and supported by qualified staff

Supporting Seniors and Caregivers

In 2011 the Baby Boomers—the largest generation of our time—started turning 65. AARP estimates that over the next 14 years, boomers will be turning 65 at a rate of about 8,000 a day. The older adult population is growing nationally, and we are seeing this growth locally. Currently 1 in 4 Monroe County residents is 55 or older. By 2040, 1 in 3 will be.

Ranging in age from 65 to over 100, the senior demographic now includes both parents and their children. Within this age range are diverse individuals with disparate incomes, health status and activity levels. Common among the group is a preference to remain independently residing in their own homes as they age. Yet for many it may be impossible to do so without assistance; a large number of seniors (43%) live alone and 32% have a disability; 24% have a disability limiting physical activities such as walking, lifting, carrying or climbing stairs; and 19% have a disability making it difficult to leave their homes to grocery shop or visit the doctor. Still others lack the resources to meet their basic needs including the 17% of seniors in Rochester who live in poverty and the 74% of seniors who are eligible to receive Supplemental Nutrition Assistance Program benefits, but are not receiving them. These seniors need varying degrees of support with transportation to medical appointments, housekeeping, personal care and navigating the network of benefits and services available to them. These supports are provided both by nonprofessional caregivers such as their neighbors, friends and family and through community programs designed to help vulnerable seniors—seniors at risk of adverse outcomes because of cognitive, psychosocial, and/or physical problems—remain as independent as possible while residing safely in their own homes.

Complicating the lives of seniors and their caregivers is New York State’s transformation of Medicaid. Medicaid is a health care program for income-eligible people that provides for acute medical needs, rehabilitation, long term care and numerous community-based services, including adult day care, and transportation assistance. In an effort to improve the quality of care for the Medicaid population while also reducing per capita costs, New York is rapidly advancing the Delivery System Reform Incentive Payment Program (DSRIPP). The multi-year initiative, valued at \$565 million for the 13-county Finger Lakes region, will have far-reaching implications for how community-based providers interact with each other and regional health systems to ensure better support for vulnerable populations, including seniors. Until the new approach is implemented we will not know the extent of the impact. To be prepared we will need to engage stakeholders and experts who can help us navigate the changing landscape and inform our practices moving forward, to include the best way to focus our resources to ensure that those not eligible for programs provided through existing funding streams and without personal resources to access services have critical services available to them.

Recognizing the growing numbers of vulnerable seniors in the community, their diverse needs, and the complexity of navigating the services available to them, we must continue making the best investments possible to help them access the supports they need to remain as independent as possible in their homes. We will partner with agencies that work toward this goal by providing comprehensive services at community-based Multipurpose Aging Resource Centers and through services provided in the seniors’ homes.

Goal: Supporting Seniors and Caregivers seeks to ensure that seniors and their caregivers have the resources they need to remain vital and independent for as long as possible.

Progress toward this goal will be measured by tracking data contributing to **Maximized Independence for Seniors** as measured by these indicators:

1. Maintained or improved social, mental, and physical wellness
2. Maintained independence in their homes
3. Increased knowledge of, access to, and utilization of appropriate community resources for both seniors and their nonprofessional caregivers

Investment Strategies: We will re-frame the single Supporting Seniors and Caregivers strategy with its three tactics: Multipurpose Aging Resource Centers, Care Coordination and In-Home Supports, into two

strategies: Multipurpose Aging Resource Centers for active seniors able to access resources in the community and In-Home Supports for vulnerable seniors. This realignment brings clarity to both our community-based and our in-home focused approaches.

Investment Strategy: Multipurpose Aging Resource Centers

Our community benefits from a rich array of services for seniors. Yet those services are remarkably fragmented, resulting in seniors and their caregivers needing to piece together services from different organizations and visit multiple sites to get the services they need. The Multipurpose Aging Resource Center (MARC) strategy was introduced in 2010 as an intentional and integrated approach to overcome this fragmentation. By bringing together providers with distinct specialties into community sites we provide a rich array of services that are attractive to seniors. Our sites have been chosen strategically based on a number of factors including their location within communities with a high density of seniors who naturally congregate there, as well as their physical capacity to accommodate both senior-specific and multi-generational programs. Programs and activities cover the spectrum, ranging from health and wellness to lifelong learning and caregiver support. They also include evidence-based programs such as Matter of Balance, Enhance Fitness, Chronic Disease Self-Management, and Powerful Tools for Caregivers, as well as access to high-quality care management services. Members are enrolling in program services in high numbers and flourishing.

Our newest MARC opened in April 2015 in Penfield, joining current centers in Rochester and Gates. With the launch of this last Center, we have completed our plan for opening three MARCs across the community. We will continue our investment in Multipurpose Aging Resource Centers, working with the current partners on the evaluation necessary to refine the model and ensure that the intended results for participation, engagement and wellness are being achieved.

Investment Strategy: In-home Supports

Seniors hope to “age in place,” that is, to live in their current homes for as long as possible. To successfully remain at home often means finding the right tools and support networks as physical and social changes associated with aging may limit an individual’s ability to otherwise do so. We will invest in services that are vital to helping vulnerable seniors maintain their independence in the community, through: (1) care management, (2) nutrition supports and (3) transportation assistance. While called out individually, we recognize that these services are not mutually exclusive, that seniors may have needs in more than one area, and that programs may deliver services in more than one area in their efforts to meet critical needs.

Care Management provides vulnerable seniors and their caregivers with comprehensive information and expertise to assess their individual needs, educate them about community resources and options, make plans for the future, and help implement decisions, all toward the goal of keeping them safely at home. This coordination is critical because the array of aging services is complex and families are typically hard pressed to make quick decisions, decisions that can lead to unintended, potentially negative consequences. We will invest in comprehensive Care Management services that:

- Reach a broad and diverse population of seniors and their caregivers
- Provide tailored services to meet individual needs
- Conduct an in-home assessment as an integral part of the care management process
- Are inclusive and have a demonstrated ability to connect a wide array of community-based direct service providers and navigate the changing landscape for seniors

Nutrition is a critical basic need and one that vulnerable seniors are challenged to meet, particularly those recuperating from acute or chronic health problems, those unable to prepare meals without assistance

and those living in poverty. We will continue to invest in programs that help seniors meet their nutritional needs through a variety of home-based approaches such as grocery shopping with or for an individual, meal preparation and home-delivered meals.

Transportation, or the lack thereof, is a significant barrier to vulnerable seniors getting their basic needs met and engaging in the community. As one transportation program volunteer observed, “if we don’t support seniors who can’t drive anymore, then we have essentially institutionalized them in their own homes.” We will continue to invest in cost-effective, senior-focused transportation services that align with our goal of providing older adults with the services they need to remain independent.

Implementing the Blueprint for Change

Implementation of this plan begins by seeking program partners interested in working with us to deliver on the declared strategies. We will do this through a two-step open and competitive application process that will launch early in September with a request for Letters of Intent. The most promising letters of intent will be invited to submit detailed proposals for funding consideration. Information about the application process and expectations of United Way partner agencies will be available at our website in August. Visit www.uwrochester.org for details.

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